Approve Invoice

Scope

This section describes how to use SFA FMS to Approve an Invoice.

System References

N/A

Policy

N/A

Responsibility

SFA Financial Partner Manager.

Distribution

N/A
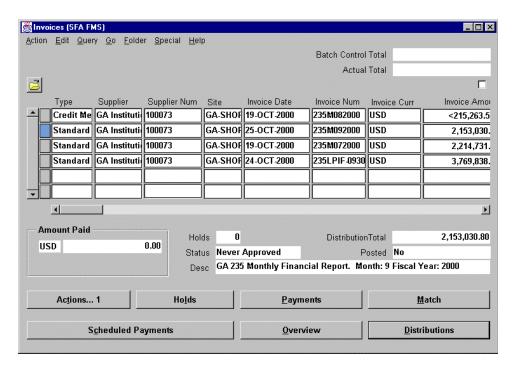
Ownership

N/A

Activity Preface

This activity is performed whenever the Financial Partners Manager needs to Approve an Invoice.

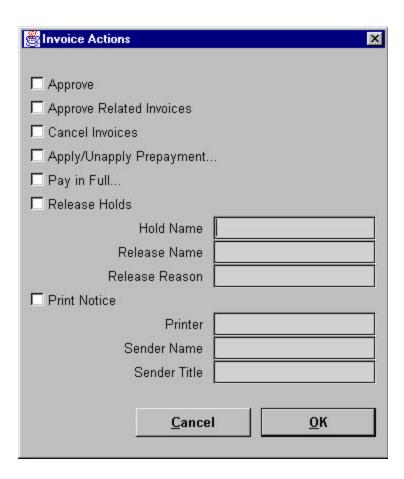This procedure continues from:

Place an Invoice on Hold [PROG0009]

Approve Invoice Reports-SFA Financial Partner Manager

1. Once the invoice has been reviewed and determined payable, from the "Invoices (SFA FMS) window, click the row of the invoice that you need to approve. The blue box at the front of the row will indicate that that invoice has been selected.
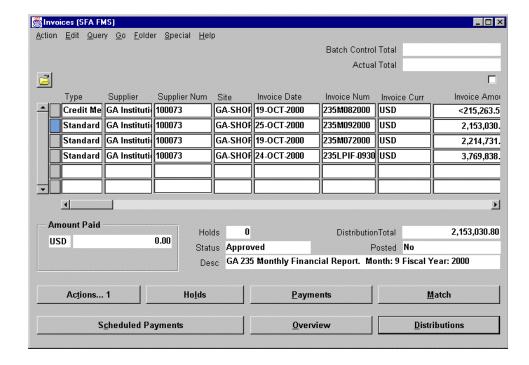

2. Click the **Actions** button. The "Invoice Actions" window appears.

3. Click the **Approve** check box and click the **OK** button. The SFA FMS system will automatically conduct funds checking at this time. A "Note" window will appear to indicate whether any holds were either placed or released from the invoice. Therefore, if the invoice had no holds before the approval, the message "No holds placed or released" indicates that the invoice was approved.

4. Click the **OK** button on the "Note" window to continue. The "Invoices (SFA FMS) - #" window appears.

5. Verify that the **Status** field has been updated to Approved.

> Once the invoice is approved, an email notification is sent to the GA and the Financial Partner common mailbox indicating that the FFEL GA SOA Report is ready to be generated.

End of activity.

Start

Approve Invoice Reports-SFA Financial Partner Mgr

- Once invoice has been reviewed & determined payable, from "Invoices (SFA FMS) window, click row of invoice that you need to approve. blue box at front of row will indicate that that invoice has been selected. (1)
- Click Actions button. "Invoice Actions" window appears. (2)
- Click Approve check box & click OK button. SFA FMS system will automatically conduct funds checking at this time. A "Note" window will appear to indicate whether any holds were either placed or released from invoice. Therefore, if invoice had no holds before approval, message "No holds placed or released" indicates that invoice was approved. (3)
- Click OK button on "Note" window to continue. "Invoices (SFA FMS) - #" window appears. (4)
- Verify that Status field has been updated to Approved. (5)

End